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ABSTRACT

This paper is intended to provide data and analysis on three general questions: What are the significant existing programs and agencies related to educational research and development (R&D) in the Northeast and what are key unmet needs for the National Institute of Education (NIE) to consider in planning for a new institution? What are various ways of providing coordinated R&D services to the region and what are the strengths and drawbacks of each alternative? What are the various combinations of states that could be included in the region and what are the pros and cons of each configuration? The paper is based on a review of materials about the history and current status of regional laboratories throughout the country and on discussions held with the Northeast's chief state school officers, teacher association officials, higher education representatives, school principals, and others. The author notes that nearly everyone interviewed felt that establishing a new institution in the Northeast was the most viable alternative for NIE to consider. The laboratory should provide leadership in research and development and coordinate independent R&D concerns under a comprehensive and regionally relevant philosophy on educational change. The author then presents her views regarding the purpose, functions, structure, and governance of a laboratory, should one be established.
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PLANNING ISSUES IN PROVIDING RESEARCH AND DEVELOPMENT SERVICES IN THE NORTHEAST

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Janice Weinman

Fall, 1980

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PLANNING ISSUES IN PROVIDING RESEARCH AND DEVELOPMENT SERVICES IN THE NORTHEAST

Janice Weinman
Fall, 1980

I. BACKGROUND

Since 1966, the federal government has supported a number of regional educational laboratories throughout the country. Originally, twenty laboratories served the entire nation; now eight of the original twenty laboratories exist, serving the Northwest, Southwest, Midwest, Far West, mid-Atlantic and Appalachian regions. Existing laboratories conduct applied research based primarily on regional problems and engage in development and dissemination activities.

The Northeast (Maine, Vermont, New Hampshire, Massachusetts, Connecticut, Rhode Island and New York) is one of the areas currently without a regional laboratory. At one time the region was served by three such institutions, located in New York City, Newton, Massachusetts and Syracuse, New York. For reasons of declining demand, budget or political support, these organizations no longer function as regional laboratories and each state in the area now relies on its own capacity for research and development. Given the unevenness of resources among the seven states, a severe imbalance of R & D services exists within the region.

In 1976, Congress appointed a Panel for the Review of Laboratory and Center Operations to advise the National Institute of Education on its relationships with the existing laboratories and centers. As part of its work, the Panel urged NIE to restore a nationwide coverage of R&D services and suggested that this be accomplished either through the establishment of new institutions or through the support of new arrangements among existing education organizations in the unserved regions. Accordingly, the Director of NIE appointed a Task Force on Nationwide R&D Services to assess the needs for additional services and options for NIE support for the Northeast, the Southeast, and the upper Midwest areas of the country.

This paper serves as input to the Task Force's deliberations. As NIE considers the possibility of extending coordinated R&D services to regions of the nation unserved or only partially served by existing laboratories, it requires an analysis of existing resources and needs in these areas. The purpose of the paper is to provide NIE with additional information and insights in its effort to decide whether to have, and how to establish an R&D institution in the Northeast. Specifically, the paper is intended to provide data and analysis on three general questions:

- What are the significant existing programs and agencies related to educational R&D in the region and what are key unmet needs for NIE to consider in planning for a new institution?

- What are various ways of providing coordinated R & D services to the region and what are the strengths and drawbacks of each alternative?
- What are the various combinations of states which could be included in the region and what are the pros and cons of each configuration?

The paper is based on a review of material about the history and current status of regional laboratories throughout the country and on discussions held with the Northeast's chief state school officers, teacher association officials, higher education representatives, school principals and district superintendents, collaborative directors, heads of educational associations, special interest groups, parent associations, private school officials, members of state and local boards of education and legislators. Table 1 presents a list of all the individuals interviewed in person. As can be seen from the table, certain groups, although reached by phone and heard from through letters, were not interviewed. It is hoped that the information received through letters and over the phone from individuals representing these groups will have served to adequately reflect their views.

The extensive amount of time spent particularly with officials from the state education agencies and teacher associations of New England was invaluable in recognizing the issues surrounding the potential establishment of a regional laboratory

in the Northeast. In addition, the insights provided by those previously associated with R&D efforts in the Northeast and by those engaged in, or receiving R&D services elsewhere in the country were helpful in gaining a perspective on the Northeast. The author wishes to thank those interviewed for the generosity in time and information provided.

The paper first compares existing R&D resources to need in order to determine whether adequate services exist in the Northeast. It then discusses several options to meet existing needs and examines whether or not a laboratory should be established. In the sections that follow, the purpose, functions and structure, geographic scope, distribution of resources and governance of a Northeast laboratory--if needed--are outlined.

The conclusions offered to the National Institute of Education for consideration are based on a surprising consensus of opinion both within groups interviewed and among different constituencies.

TABLE 1

INDIVIDUALS INTERVIEWED

U.S. Department of Education

Thomas Burns, Regional Administrator, Region 1

Chief State School Officers

Gregory Anrig, Massachusetts
Robert Brunelle, New Hampshire
Arthur Pontirelli, Rhode Island
Harold Raynolds, Maine
Mark Shedd, Connecticut
Robert Withey, Vermont

P. Allistair McKinnon, Special Assistant for Intergovernmental Affairs, New York State Education Agency (SEA)
JoAnn LoCicero, Special Assistant to the Deputy Commissioner, New York SEA
Cecilia DiBella, Project Director, the Massachusetts Dissemination Project, Massachusetts SEA
Mary Perry, Title IV Coordinator, Vermont SEA
Doug Dopp, Title IV Coordinator, Connecticut SEA
Chris O'Neil, Executive Assistant to the Commissioner of Education, Rhode Island SEA

Teachers Associations

J. Casey Olds, Director of Professional Development, Massachusetts Teachers Association
Fred Andelman, Deputy Director of Professional Development, Massachusetts Teachers Association
John Marvin, Executive Director, Maine Teachers Association
Sherwin Kapstein, Executive Director, Rhode Island Teachers Association
Richard Lang, Executive Director, Vermont Education Association
David Bongiolatti, President, Vermont Education Association
Robert Chase, President, Connecticut Education Association
Robins Barstow, Director of Professional Development, Connecticut Education Association

Higher Education

Paul Rahmeier, Deputy Chancellor, Massachusetts Board of Higher Education
Marcia Marker Feld, University of Rhode Island
Robert Koff, Dean, School of Education, SUNY/Albany

School Superintendents

Edward Martin, Executive Director, New England Association of School Superintendents
Jerome Jones, Superintendent of Schools, Prividence, Rhode Island

Area Collaboratives

John J. Allison, Jr., Executive Director, Capital Region Education Council, West Hartford, Connecticut
Gregory Benson, Executive Director, Capital Area School Development Association, Albany, New York

State Associations

Elaine Stoddard, Executive Chairman, New York State Council of Educational Associations

Other

Fred Burke, Commissioner of Education, New Jersey Department of Education
Robert Dentler, Director of Education, Abt Associates
Fritz Mosher, Director of Education, Carnegie Corporation
John Hopkins, Executive Director, Research for Better Schools
John Connolly, Deputy Director, Research for Better Schools
Jeanne Frankel, Executive Director, Public Education Association
Terry Clark, Project Director, MEDARP

II. ANALYSIS OF EXISTING R & D RESOURCES

The Northeast region is composed of 110,782 square miles. The region serves over six million elementary and secondary school students with 321,272 elementary and secondary teachers, and 26,622 principals, consultants and supervisors of instruction. Table 2 presents this regional profile by individual state. As can be seen from the table, New York is by far the largest in each of the three characteristics; and (except for square mile area) Massachusetts ranks second, Connecticut third, Maine fourth, Rhode Island fifth, New Hampshire sixth, and Vermont seventh.

In examining the profile of the Northeast one must also keep in mind the vast array of resources within the area. The region boasts the greatest concentration of research agencies, dissemination and media resources, as well as the most prominent universities in the nation. The international headquarters of the nation's print, video and telecommunications media are here. Given the plethora of resources in the area, a primary and fundamental question must be answered: Is there in fact a need to establish a new institution to serve the region's educational R & D requirements? Can't the states continue to rely on their existing capacities? Would it be more appropriate to consider the support of new arrangements among existing educational organizations in the area? Or should thought be given to extending the boundaries of existing laboratories to the Northeast?

Table 2

	Total	New York	Mass	Conn.	Maine	RI	NH	Vermont
Sq. Miles	110,782	47,831	7,826	4,862	30,920	1,049	9,027	9,267
Population	30,088,452	18,241,[illegible]	5,689,170	3,032,217	993,663	[illegible],723	737,681	444,722
T/C/S Teachers	321,272	188,572	61,045	36,573	11,220	9,422	7,512	6,024
P/C/S of Inst.	26,624	17,481	4,915	1,895	752	583	551	465
E/S Students	6,032,639	3,453,[illegible]	1,212,254	667,[illegible]	245,717	190,920	176,432	106,236

State Ranking

	New York	Mass.	Conn.	Maine	RI	NH	Vermont
Sq. Miles	1 (43%)	5 (7%)	6 (5%)	2 (28%)	7 (1%)	4 (8%)	3 (8%)
Population	1 (60%)	2 (19%)	3 (10%)	4 (3.3%)	5 (3.1%)	6 (2.4%)	7 (1.4%)
E/S Teachers	1 (58.6%)	2 (19.2%)	3 (11.3%)	4 (3.4%)	5 (2.9%)	6 (2.3%)	7 (1.8%)
P/C/S of Inst.	1 (65.6%)	2 (18.4%)	3 (7.1%)	4 (2.8%)	5 (2.1%)	6 (2%)	7 (1.7%)
E/S Students	1 (57%)	2 (20%)	3 (11%)	4 (4%)	5 (3.1%)	6 (2.9%)	7 (7.1%)

E/S Teachers = Elementary/Secondary Teachers
P/C/S of Inst. = Principals, Consultants, Supervisors of Instruction
E/S Students = Elementary/Secondary Students

Other Organizational Factors

USOE Regional Offices	1	1	0	0	0	0	0
ERIC Clearinghouses	2	0	0	0	0	0	0
Capacity Building Programs (yr)	Yes (5)	Yes (4)	Yes (3)	Yes (1)	Yes (4)	Yes (4)	Yes (1)

Indiviuual State Needs and Resources

As the demands of the seven states in the Northeast vary, so do the resources to meet their needs.

Conversations with educators throughout New England indicate that the three Northern tier states (Maine, Vermont, New Hampshire) are most similar in their R & D requirements. According to both teachers and administrators, substantively all three need help in addressing problems of energy conservation and school utilization; special education; and rural education. Additionally, Vermont requires an up-to-date, reliable data base for developing legislation for state aid to education and more extensive analyses on the impact of competency standards. State education officials in New Hampshire feel that the state needs research on teacher training and on the use of the computer for individualized education. And the Chief State School Officer in Maine could use material relating the findings of such studies as 1500 Hours to his state's own secondary schools.

In addition to research support, all three states need technical assistance; New Hampshire particularly to develop innovative curricular approaches and to provide leadership training to school principals, Maine to better infuse a greater humanistic approach into the traditional pedagogy of its isolated areas.

All three of the Northern tier states possess essentially the same type and quality of resources to conduct educational

R & D: a bare-bones state education agency staff with little time for, and skill in, research and analysis, and a state university system limited in access to local school districts, in research expertise and in availability of faculty to do R & D work. This dearth of capacity seems to result primarily from insufficient funding for education, thereby forcing public agencies to focus on activities most immediate and pressing. And, while other additional resources exist in the individual states (e.g., private colleges, federally funded teacher centers) none provides the depth, range and consistency of research support required by Maine, Vermont and New Hampshire.

Rhode Island shares a similar gap between need and resource availability. Although not as isolated as the three Northern tier states, representatives of both the state education agency and the teacher association feel that Rhode Island lacks R & D support for testing curricular alternatives to meet the needs of different types of students it serves. And, it too requires assistance in building an appropriate in-service program to deal with emerging federal mandates. Although it possesses a state university system, a reknowned college and several teacher centers, the state lacks specialists in such areas as bilingual education, special education and school-based management. Consequently, the state education agency has had to spend discretionary money to draw upon expertise from R & D laboratories in other parts of the country.

Connecticut, Massachusetts and New York are served by significantly more resources. Connecticut has a growing R & D department in the state education agency, a university system fairly accessible to the state education agency and local education agencies, and at least one collaborative successfully serving a variety of research, technical assistance and in-service needs of a consortium of school districts. Despite these provisions, Connecticut's educational leaders acknowledge the absence of a formalized R & D vehicle to turn existing resources to local school improvement. In addition to this overriding need, teachers and school superintendents could use R & D support to systematically examine the relationship of the educational and juvenile justice system, to objectively address the problems of school discipline and to effectively handle the challenges of serving the gifted and talented.

In Massachusetts, a number of agencies and organizations are equipped to conduct research and others are specifically designed to help schools, parents, and communities, find, select and use educational resources. Among those institutions actually performing research are the public and private post-secondary institutions, general research outfits (A.D. Little, Clark Abt Associates, etc.) and educational R & D organizations (e.g., Educational Development Center, Inc.). Among those offering dissemination services to the educational community are the state education agency, the regional centers of the SEA, and

an extensive number of private organizations (including CEDIS Curriculum Service Center, Citizen Resource Center, Institute for Responsive Education, Merrimack Education Center, and The Network). In addition, while the Massachusetts Teachers Association constitutes a major user of dissemination services, it simultaneously develops and provides extensive materials to its constituent members. It also serves as a participant and/or broker in providing in-service programs to teachers throughout the state. Yet Massachusetts educators (including teachers, state and local administrators, and higher education representatives) too recognize that the state has unaddressed R & D needs: the effective application of locally-developed technology to classroom instruction; programmatic accommodation to declining state and local revenues; institutionalization of successful approaches to such populations as the handicapped and bilingual.

New York State rivals Massachusetts in the extent of educational R & D resources. In addition to research centers located at many of the private and public post-secondary institutions (Columbia, N.Y.U., SUNY/Albany), the state can claim the presence of such public organizations as the Community Service Society, Advocates for Children, Public Education Association, etc., and such private firms that develop curriculum materials as McGraw Hill, etc. Furthermore, the state education agency operates a large research department as does the state university system.

Notwithstanding the plethora of institutions, organizations and agencies conducting educational R & D in New York State, educators admit to unattended gaps in information and service on the local level. For example, the New York State Council of Education Associations claims that there is little definitive research on effective programs for New York's gifted and talented. State education department officials admit that there are still some unanswered questions concerning the best ways to upgrade educational quality in the rural, isolated areas of the state and to build effective connections between work and education. And despite fully operational intermediary agencies, school district administrators feel that there is as yet no complete outreach of dissemination services.

Regional Needs and Resources

Despite the diversity of the states' demographic profile and educational resources, a prevalent consensus among educators across the region is that they share a number of social conditions and significant cross-cutting needs. Most overriding is the fact that the region, as a whole, is in a state of decline rather than growth. Such cities as Hartford, Connecticut, Rochester, New York and Boston, Massachusetts, for example, face similar fiscal problems, lingering integration concerns, and the challenge of motivating an entrenched instructional staff.

Rural areas in New Hampshire, Vermont, Maine, and parts of New York State have to deal with daily concerns of service delivery to remote areas, effective multiple usages of school buildings, and raising of students' competency standards.

Generally, local school systems throughout the Northeast are confronted with declining enrollments, the need to equalize school finance, and a growing strain between public and private education. Most fundamentally, however, schools are challenged by the need to upgrade their overall school program; to coordinate categorical efforts at improvement; to upgrade the professional skills of all their teachers and administrators in an effort to bring about meaningful change. In order to meet these needs, educators throughout the Northeast indicate that at all levels--the school, the district, the state--they need information that is coordinated and made relevant to their type of organization.

In addition to their needs, the Northeast states have in common a number of resources. Beyond the educational R & D outfits located in Massachusetts which frequently service individual Northeast states outside Massachusetts (e.g., The Network, Merrimack Educational Center), there are at least three organizations organized to service the whole region. These include the New England School Development Council (NESDEC), the Rx Exchange, and the U.S. Department of Education Regional Office.

NESDEC is a non-profit organization whose general purpose is the improvement of education throughout New England and particularly in those school districts which constitute its membership. NESDEC provides its member districts such services as field studies; short-term consultations; enrollment projections; conferences and workshops; mail packets, monographs and equipment inventory systems. Any public school district or non-public school in New England may become a member of NESDEC for an annual rate of 20¢ per pupil with a $125 minimum and $800 maximum charge.

Since 1979, the National Institute of Education has funded the development of a Research and Development Exchange (Rx) in the Northeast. The Northeast Rx has served the state education agencies by conducting a regional needs assessment, awarding six small grants to address identified needs, and initiating training and technical assistance in areas covered by the grants.

Under new direction, the Regional Office of the U.S. Department of Education has recently assumed a number of leadership functions for New England. These include raising public attention to the need and potential for coordinated, regional R & D; establishing communication among state education agency staff; and documenting and disseminating information on validated practices in New England.

Options for Providing R & D Services to the Northeast

Several options exist to provide R & D services to the region (such as expanding the boundaries of existing laboratories, establishing one or more new institutions, or supporting a combination of existing organizations). Each alternative has strengths and drawbacks which must be considered.

Option 1: Rely on Existing State Resources

There are two ways in which one can rely on existing resources: either by maintaining the status quo and allowing demand to continue to define the nature of services offered, or by directing money that would otherwise be used for a regional laboratory to local operating organizations.

The advantage of simply maintaining the status quo is that current resources are experienced and accessible; retaining them would allow for continued immediate and direct programs for their clients. And, if the funds which would go towards a laboratory were distributed to existing structures, these already accepted organizations would be able to do their job better, thereby providing individual localities and states with more tailored service.

On the other hand, continuing to rely on existing resources in each state would do little to balance R & D services throughout the region. While additional funds would perhaps help the quality

and range of localized service, they would not necessarily add to an equalization of resources in the Northeast. Furthermore, without the presence of an institutionalized regional/federal partnership, standards for R & D performance would remain highly localized. This does not necessarily mean that services would be of poorer quality; rather they would not as easily benefit from the wider perspective useful in upgrading educational quality. Finally, and most importantly, none of the existing organizations currently serving in an R & D capacity are seen by Northeast educators as adequate resources for the future. Significant reservation was voiced over the capability of post-secondary institutions to undertake R & D. Teachers and school and district administrators often expressed the view that institutions of higher education are inaccessible, inflexible and unresponsive to local needs--that they have a life of their own which has nothing to do with school concerns. They are seen as able only to undertake research related to specializations in their departments and rarely able to, or interested in, working directly at the site.

A great deal of concern was also voiced by teachers and educational administrators over those organizations that are now heavily involved in curriculum design and production. Constituents felt that such organizations tend to care more about profit than serving the educational community; that they are remote intellectually snobbish and interested in issues that they alone consider important and interesting. And serious concerns were also

raised over numerous existing outfits involved in dissemination which teacher association representatives in particular perceive as packaging their technical assistance and information to uniformly meet local needs.

Option 2: Support New Arrangements Among Existing Organizations

Relying on, and even bolstering, the capacity of the three organizations which currently serve the region (NESDEC, Rx , and the Regional Office) warrants consideration. Since all are concerned with at least every state in New England, the problem of local concentration that would be faced by relying on state resources would not exist. Another advantage in relying on existing interstate resources is that it eliminates the extensive period of time involved in planning a new structure to coordinate and deliver regional R & D services. Furthermore, it maximizes the use of new monies directed toward R & D in the Northeast since it leverages already invested funds and existing operational resources.

The disadvantages include the following:

- NESDEC provides services on a fee basis and offers only limited expertise. Constituents feel it would be difficult to change its thrust from essentially service to R & D.
- Since the Rx primarily serves the state education agencies, there is no guarantee that it will be able to

establish the trust among other major clients in the Northeast (e.g., teachers, school superintendents, parents) to expand its services to a broader constituency.

- Neither the Rx nor the Regional Office presently have on board an experienced staff of research specialists. Given--in the case of the Rx--a contracting role, and--in the case of the Regional Office--a leadership function, it might be difficult to change the organizational image enough to draw a credible R & D staff. While it is true that the influx of new monies (otherwise available for a laboratory) would help to draw R & D expertise, the nature and operation of these would have to change to accommodate such individuals. And, the process of organizational change might be just as cumbersome as organizational creation.

Option 3: Support New Arrangements Among Existing Organizations

Another possible option would be to establish a Regional Council. Such a structure would include the region's state superintendents, teacher leaders and deans to plan cooperative exchanges of research, proven educational practices, and knowledgeable staff. The Council would serve as a forum for raising, on a regional level, common issues, and a catalyst for sharing resources and expertise.

The advantages of establishing a Regional Council include:

- Should only limited amounts of money be available for regional R & D services, this structure could function on a minimal budget.
- Efforts of this sort have proven workable in other parts of the country (e.g., the Northwest, the Southeast); successful models could be drawn from.
- Such a structure would possess all the advantages of a laboratory (e.g. providing a vehicle for constituency representation, for presentation of critical issues, for coordination of resources) without the headaches of a lab (e.g., staffing, fiscal stability, competition with existing sources of R & D and technical assistance).

The major disadvantage of creating a Council is that since such a structure is more of a forum it is limited in what it can actually achieve. Particularly in the Northeast, where educators are tired of one coordinating effort after another, little attention and commitment might be given to a structure that relies, fundamentally, on existing resources to make it work. Furthermore, much of what a Council would start out doing is already being done, for at least some constituencies, through the Rx and the Regional Office.

Option 4: Extend the Boundaries of Existing Labs

N.I.E. currently supports eight regional educational laboratories: Appalachia Education Laboratory (AEL); Cemrel, Inc.; Far West Laboratory for Educational Research and Development (FWL); Mid-Continental Regional Educational Laboratory (McREL); Northwest Regional Educational Laboratory (NWREL); Research for Better Schools (RBS); Southwest Educational Development Laboratory (SEDL); and Southwest Regional Laboratory for Educational Research and Development (SWRL).

Geographically, RBS is the only laboratory with some proximity to the Northeast. Extending RBS's boundaries to encompass the Northeast is impossible to accomplish. RBS is reluctant to take on any additional states to the three it services--Pennsylvania, New Jersey and Delaware. Given its conviction to maintain strong services to its current clients, it would be unrealistic to consider affiliation of all (or even any) of the Northeast states with this lab.

Substantively, the Northeast shares some common problems with AEL and CEMREL. Serving the rural and extreme rural areas of Alabama, Kentucky, Ohio, Pennsylvania, Tennessee, Virginia and West Virginia with a population closely tied to tradition, home, neighborhood and family, the Appalachia Educational Laboratory faces problems resembling those of the isolated sections of Maine, Vermont, New Hampshire and New York. Having enhanced the quality of life in the Appalachian Region by improving education through

R & D services and products, this lab could be a valuable resource to the rural sections of the Northeast. However, its impact would be limited to only the most remote areas of the region.

CEMREL caters to both regional and national needs. Among its activities is a new urban education program which is a collaborative effort with the region's 20 largest urban systems to see how R & D resources can help meet their needs. In the area of product development there are two programs of potential relevance to the Northeast: research and curricular development in the arts and humanities and in math. In either case however, transferability to the Northeast would require careful application.

Beyond the specific drawbacks associated with extending the boundaries of RBS, AEL and CEMREL to the Northeast are some general problems. New England, probably more than any other area, has a strong regional identity and geographic ties. (For example, it is the only part of the country to have a regional school superintendents association.) Having to rely on an organization outside its region to help identify and find solutions to its problems could be difficult for the Northeast area to accept.

The logistics of servicing so large a region from an institution located at a distance from most of the Northeast states would also be problematic. Both the intensity of service and the frequency of delivery would be minimized. The establishment of satellite organizations in the Northeast might replace problems of distance with those of identity conflicts.

Option 5: Establish a New Institution

Every person interviewed was asked whether or not he or she felt a laboratory was needed in the Northeast or whether existing resources or a new configuration of them could meet current and anticipated R & D demands. Nearly everyone felt that establishing a new institution in the Northeast was the most viable alternative for N.I.E. to consider.

The problems associated with establishing a laboratory are numerous. Given the many R & D organizations in the region, it will be difficult to carve out a meaningful and overriding role that does not intrude upon or usurp existing functions and relationships. Given the plurality of groups interested in and benefitting from R & D services, it will be difficult to establish an organization that is both responsive and responsible. And, given the disappointments that the Northeast has experienced with previous N.I.E. funded R & D laboratories in the region (many individuals interviewed voluntarily recalled the failures of these institutions), it will be difficult to create a structure that will be readily accepted and credible to the Northeast educational community.

Nonetheless, nearly everyone felt that N.I.E. should seriously consider the development of a new regional laboratory in the Northeast for one or more of the following reasons:

- Building up existing state organizations will do little to rectify the current geographic imbalance, to coordinate uneven and sporadic R & D efforts, and to raise common problems and issues to a regional level worthy of concentrated R & D attention and accompanying widespread technical assistance.
- Reinforcing existing regional arrangements will fall short of guaranteeing comprehensive constituency participation and sufficient human resources to do justice to the Northeast's sophisticated research agenda.
- Establishing a Regional Council will not insure that R & D services are coordinated since such a structure will have neither the power to compel existing organizations to cooperate nor the institutional capacity to accomplish this itself.
- Expanding the boundaries of other regional laboratories to the Northeast is unfeasible and unrealistic both geographically and substantively.

Most fundamentally however, the general impression conveyed by educators throughout the Northeast was that an organization is needed that will serve two functions: provide leadership in research and development and coordinate independent R & D concerns under a comprehensive and regionally relevant philosophy on educational change. It was felt that these two functions could probably best be accomplished by a broadly represented

organization with a capacity both to encourage sharing of resources as well as to provide R & D services that otherwise could not be furnished.

In the sections that follow the author presents her views regarding the purpose, functions, structure and governance of a laboratory, should one be established. These views are based on the overriding impressions received during interviews conducted with educators throughout the Northeast. They are intended simply to inform the Institute of prevalent opinions and not to force an organizational blueprint on a structure that will be planned by the constituents of R & D services in the Northeast.

III. PURPOSE

The functions, structure and governance of an R & D laboratory can be expected to flow heavily from the organization's purpose. That purpose will be largely defined in response to identified regional needs.

Traditionally, needs assessments uncover very specific substantive problems that require targeted attention (e.g., basic skills, energy conservation, building utilization, etc.). In doing so, the more general psychological and potential catalytic impact of an R & D organization are often overlooked

Because of the proliferation of R & D resources in the Northeast many specific problems are already being addressed. There is little need for another institution only devoted to assisting the educational community deal with specialized problems.

Judging from the remarks made by educators throughout the Northeast, what seems to be needed is a regional capacity that will stimulate, challenge and reinforce local efforts toward school improvement, rather than simply solve and help overcome isolated problems.

The Northeast is well-known for its sophistication in the development of effective practices. It has also long

been a laboratory for educational innovation and the application of new pedagogical approaches. And, as noted, it is saturated with resources that can meet specialized needs.

But the Northeast is undergoing a period of fiscal decline and, according to some interviewed, a concurrent period of professional stagnation. Few external incentives and school-based opportunities exist for programmatic and personal enhancement.

In establishing a laboratory for the Northeast, it would be important to first consider what must be done in the region's schools to effectuate change. Given what respondents identified to be regional needs, it appears that the lab might focus on school improvement, staff rejuvenation and curriculum development.*

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* Such an emphasis does not imply that--like a Center--the lab would concentrate only on specific topics. Nor does it mean a premature determination of its agenda or that its purpose would be established prior to a needs assessment. What is suggested is that certain generic issues that seem critical to the region be used as a framework within which to formulate a mission and gauge against which to evaluate the importance of issues identified in the needs assessment.

In the continuing quest for ways to improve education, there is a growing trend towards school-based, school-wide reform efforts. These efforts, which exist in several variations, are all based in large part on analyses of the failures of top-down reforms and a growing consensus on the characteristics of effective schools. The analyses suggest, for example, that schools are more likely to change if school staff are instrumental in designing the change and if the school is viewed as a whole rather than a set of piecemeal activities and separate empires by program or classroom.

Local school improvement (SIP) requires a complete commitment and comprehensive approach to educational change. It does not (as when adopting or adapting validated practices) merely require installation of specific products and approaches.*

Because of the demands that school improvement places on teachers, administrators and the school organization (e.g., a unified approach, shared goals, a climate conducive to learning, and access to outside resources, among others) the concept and procedures for implementation require strong encouragement and substantial reinforcement. A research and development laboratory can provide the philosophical direction, psychological support and technical assistance necessary to undertake such a program.

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* These remarks are drawn from a paper by Jane David on assessing school-based, school-wide reform strategies.

Based on observations and discussions, the author suggests that N.I.E. cannot conceive of a Northeast laboratory in the terms used fifteen years ago when previous labs were being developed. The new organization should be developed around an educational philosophy rather than a set of functions. And, given current school-wide needs and the range of existing resources available to handle specific problems, an R & D capacity must be seen as more process- than product-oriented; more ready to help schools find their own solutions than to develop and install validated practices.

Utilizing the philosophy of school improvement as a research and development base, a regional laboratory can help educators relate problems of bilingualism, special education, basic skills, Title I implementation, etc. to the overall organizational goals of their schools. Utilizing school improvement as a base, an R & D lab can help coalesce the local educational community since administration, teacher and parent participation is critical to the process. For, research on characteristics associated with effective schools indicates that, to the extent that change is possible in schools, it is most likely to occur if those people most immediately involved (teachers, parents, principal) are participants in the decision to change, the goals of the change, and the process by which change will occur, and if they view the school as a whole.

The author would further suggest that the substantive and procedural support that a lab can give to local school improvement efforts could manifest itself in yet another way that would be helpful to education in the Northeast.

Accompanying recent fiscal reductions are fewer opportunities for mobility and career diversification for teachers. Few occasions exist in which educators can alter the nature of their activities and thereby be professionally rejuvenated.

In systematically addressing school improvement, professional development becomes (according to some studies) an automatic consideration. The now well-known Rand Study, for example, documents the importance of staff involvement in effectuating long-lasting change. Citing the correlates of a successful implementation process, the Rand Study includes the emergence of a critical mass of teachers, the local development of materials,and staff training keyed to the local setting.

Finally, closely associated with overall school improvement and staff rejuvenation is the issue of curriculum revitalization. In the rural isolation of Maine and New Hampshire, as in the urban setting of downtown Boston and New York, daily survival becomes a primary and often overriding concern. Humanistic considerations rarely enter into the operational activities of teachers and administrators.

Unlike local boards of education, state education agencies, and even post-secondary institutions, an R & D labora-

tory has the independence and flexibility necessary to help schools identify and inject curricular and pedagogical approaches that can uplift and make more meaningful their programs. If presented in the context of school-based, school-wide reform, these approaches can be more easily institutionalized.

During the discussions held with educational administrators, teacher association officials and representatives of higher education, it became clear that establishing a laboratory with a basic educational philosophy that ties together regional R & D activities might be significant for many reasons:

- It would provide the laboratory with a basis for coordination and thereby makes it an umbrella organization instead of merely another resource to perform essentially the same kind of research currently being undertaken;
- It would provide the region with a substantive framework under which local school districts and schools could address specific problems;
- It would fill a critical substantive and technical assistance gap that other agencies are not able or not expected to fill;
- It would provide N.I.E. and the national R & D community with an organizational model of how a lab can operate under a substantive theme and consequently

under a comprehensive, rather than project approach; and

- It would provide N.I.E. and the national educational community with insights into the R & D support that is needed and appropriate for local school improvement.

IV. FUNCTIONS AND STRUCTURE

Regional laboratories have traditionally been designed to conduct applied research, giving emphasis to development and dissemination. In this role, their institutional functions usually include:

- Needs assessment and the identification and clarification of problems in the laboratory's region;
- Provision of R & D based services to practitioners in the laboratory's region, stimulating or sponsoring R & D by other performers where appropriate;
- Maintenance of strong and broadly representative constituent governance and advisory structures;
- Exploratory R & D to develop approaches to solving the region's educational problems;
- Dissemination;
- Collaborative planning with other R & D performers and N.I.E. staff;
- Assistance to N.I.E. through pursuit of mutually defined short-term activities;
- Institutional development through visiting scholar programs and staff development activities;
- Sponsorship of training programs; and
- Institutional self-evaluation.

Operating from the author's recommendation that the Northeast laboratory might have an overriding and inclusive educational philosophy, the functions of the organization would then be viewed as components of that philosophy, rather than ends to themselves. Whereas other laboratories in the country and R & D organizations in the Northeast take on "projects" from which they derive their functions (unrelated to other projects), the Northeast lab might better serve its region by structuring its responsibilities around:

- Defining the dimensions of school improvement;
- Planning, coordinating and monitoring R & D and technical assistance activities related to school improvement and its associated issues; and
- Undertaking leadership activities (e.g., conferences, publications, dissemination) that will help to raise the psychological climate of the area and consequently improve educational services.

Focusing on these functions would in no way exclude the laboratory from the typical responsibilities performed by such organizations. Rather, it would place a priority on certain obligations and establish a relationship between individual functions.

Clear consensus exists throughout the Northeast that a new laboratory should have a bare-bones structure. Rather than

compete with highly qualified institutions to conduct research and deliver services, the lab should, instead, concentrate on coordination and leadership activities.

This position has merit in that it would cut overhead costs (and thereby permit more funds to flow directly to the educational community) and would prevent the development of a new institution concerned with organizational survival. However, under such a structure it would be difficult to establish operational continuity and to draw highly qualified specialists (since staff would be primarily involved in negotiating out R & D work).

Given these considerations, the author suggests that the Northeast laboratory might constitute a hybrid structure that possesses an adequate central capacity to play a strong planning, administrative and leadership role supplemented by a staff that will provide technical expertise necessary to initiate and monitor decentralized direct service activities.

A strong core staff would be needed to--in conjunction with the governing board--establish overall directions and a long-range research agenda; to--by undertaking minor experimentation and analysis--develop models and design appropriate systems for effectuating educational change; and to define the parameters of school improvement based on the results of experimentation.

A core support staff of generalists would also be needed to provide technical know-how, to negotiate out activities to R & D organizations, and to monitor R & D and technical assistance activities. (Field-based organizations would be assigned responsibilities either on a consultant basis--that is, organizations assessed as qualified to perform specified functions would be "on-call" for certain activities--or through subcontract.)

Pilot testing of models designed at the laboratory would be a decentralized process conducted by a school, local school district (LEA), or non-profit organization (NPO), in conjunction with the most appropriate resource (institute of higher education (IHE), state education agency (SEA), LEA, NPO). That resource agency would conduct on-site R & D and/or would help in training personnel, building into the SIP an information base, or addressing specialized concerns within the context of overall change.

The central staff of the laboratory would provide back up to the school site program through follow-up and feedback, leadership activities, and direct service in those cases where relevant capacity does not exist among existing resources. The core staff would evaluate the procedures and outcomes of local school improvement efforts and would evaluate findings to reaffirm regional approaches or redirect the laboratory's R & D agenda and operational priorities. Finally, the core staff would train the project directors hired through the resource agency so that on-site R & D would be implemented within the analytic framework conceived of by the lab's central staff.

Operationally, then, such a structure would mean the following: The laboratory staff would utilize its expertise to establish the working hypotheses and develop appropriate models to address school improvement and specialized problems included under this generic and comprehensive process. As such, it would serve as a think tank to determine the parameters for regional educational R & D to be conducted by specialized R & D outfits. It would then assign other organizations to test out the Hypotheses at local sites, to tailor models to the specific needs of the clients and to build up the institutional strengths of the school, IEA, SEA or NPO so that the change process becomes intrinsic to the local institution. An appropriate and inclusive governing body at each site would help in planning local R & D strategies and methods for implementing results. The laboratory core staff would reinforce the local site process through formative evaluation and information dissemination.

The structure suggested above accomplishes a number of organizational objectives:

- It provides the laboratory staff an opportunity to conceptualize R & D approaches but allows existing research institutions to--in conjunction with the laboratory's clients--pilot test the concepts. In this way, the laboratory retains developmental responsibilities without being involved in actual site research and technical assistance.

- Because a strong constituency does not presently exist for R & D, the development of a lab has to be accompanied by the nurturance of a constituency for research. Establishing local governing bodies to help in planning and implementing R & D findings will help to mobilize more widespread support for R & D.
- By removing laboratory staff from site-based R & D activities, the laboratory will be able to better concentrate on overall regional, rather than specific project, needs. Consequently, it will be better able to perform a leadership role--to throw out new ideas to the field, to convene discussions on ways to address specific issues, and to publish and disseminate research hypotheses and field-tested results. In this way, it will be able to reinforce the catalytic function that such public agencies as the regional office and state education agencies play with regard to school improvement.

V. DELIVERY OF SERVICES

The issue of service delivery is an important one to potential clients of an R & D laboratory because it covers concerns over centralization versus decentralization, adequate outreach versus difusion of services, and control.

There are several ways in which services could be delivered to the laboratory's clientele. Some of these have already been described in a planning document of the Northeast Exchange, others were suggested during interviews. Those described in the Rx document have been literally repeated here.

Core Satellite Model

The core-satellite model would locate a core in one area of the Northeast. The staff of the core would serve designated states. Satellite centers would then serve other states. A variation of this model would consist of one core and one satellite center.

In the core-satellite model a director would be housed in the core. Professional staff would also be at the core and in the satellites. Programs would be planned with the overall professional staff and delivered via the assigned centers. The staffs at the centers and the core would serve several states according to functions. Non-professional staff would be needed in each center and in the core.

The core and each center would be responsible for determining needs; for ascertaining resources in the area; for disseminating information; for brokering and delivering services; and for planning overall strategies with the entire group.

The advantages of this approach are:

- Staff would be placed closer to the states they serve and would be able to provide services more quickly;
- Staff would be in a position to know and better understand the states. Similar problems could be recognized and attacked.

The disadvantages include:

- Delivery of services would be expensive because of separate housing and multiple equipment needs;
- Satellite centers might identify closely with one state at the expense of the region.

Core-Extension Agent Model

The core-extension agent model would be one in which a center would be developed in one location. Within that core the staff would consist of professionals who were assigned to each state. These professionals would be housed at the core, but would travel to the states and act as liaisons to individual states.

Services would be provided by staff as well as brokered out to other agencies.

Variations on this model would be that one extension agent could serve several states and/or the extension agents would serve functional as well as liaison roles. Another variation of this model is that the extension agents would be housed in the states they serve instead of at a central office. They would then travel to the central office several times a month for regional planning.

The advantage of this design is that it would enable constant close ties to the states. On the other hand, care would have to be taken to ensure that the extension agents feel themselves part of the lab as well as the state they are serving. There is danger of too much identification with the state. Also, depending upon the number of extension agents, the core-extension agent model might become expensive because of the number of salaries.

Core-Functions Model

The core-functions model would have one central base. The staff roles would be delineated by functions. For instance, one staff member would coordinate needs assessment, another would coordinate resources, another would coordinate inservice training. Staff would all go into each state depending upon the service being rendered. All staff would aid in planning and delivery of services. Services would be brokered as well.

The core-functions model puts more emphasis on the functions than on the state specialization. There would be no one person that each state would contact or work with to facilitate services. However, in the core-functions model the state would be assured that regional needs would be addressed in that no one person would be liason to any one state.

Brokerage Model

In the brokerage model, the laboratory would deliver no direct services, but would act as a broker to other agencies for services. The staff would serve to assess needs, write RFP's and to contract for services with appropriate agencies. The staff would have to monitor contracts or hire evaluators to do so. Since, under this approach, all services would be brokered, an efficient and effective system for contracting would have to be developed. The lab's own emphasis would have to be placed on needs assessment and long-term planning. Little crisis intervention could be done.

The brokerage model would not have individual state liasons, so that communications with the states would be either through the small staff or the contractees.

More external agencies would be involved in delivering services. This would enable a larger network to be built to deliver services to states.

One danger of a brokerage model to service delivery is that there would be less visibility as an agency than with the other three models. SEA's, teacher organizations, etc. could easily request operational funds to broker their own services.

Questions of service delivery, as those of function and structure, will certainly be reviewed during the planning period. A decision on the most appropriate type will be highly dependent on its "fit" to the laboratory's structure.

Should a structure be established of the type suggested by the author, it would seem that the form of service delivery most suitable would be one that combines the core functions and brokerage models through (1) a strong centralized organization, (2) built on functional responsibilities, and (3) achieving outreach through services assigned to other organizations.

Such a mode of delivery would be appropriate for the following reasons:

- Since staff of the type of laboratory being proposed in this paper will be primarily responsible for analytic design and development, for overseeing subcontracted field R & D, and for regional leadership activities, it will be difficult to accomplish these functions through a geographically dispersed organization. Hence, a centralized capacity is being proposed.

- Furthermore, since the professionals' role will be largely conceptual rather than logistical, they will be better equipped and more comfortable dealing with clients on a functional rather than geographic basis.
- Finally, since it can be assumed that much of the on-site R & D responsibilities will be awarded to organizations with their own outreach capacity, localized service delivery can be achieved through brokerage rather than through the establishment of satellites or the assignment of extension agents.

Most importantly, this form of service delivery would address the strong preferences articulated by the constituencies interviewed, preferences for--

- A small, centralized staff;
- Without individual state liaisons; and
- With a functional rather than geographic orientation.

VI. DISTRIBUTION OF RESOURCES

A policy on the distribution of resources clearly will impact on the number and type of activities undertaken by the lab. Should there be one pot of money available to the lab for a variety of regional activities? Should the money instead be apportioned to the states (either equally or on a proportional basis)? Should part of the resources be maintained by the lab and the remainder allocated to the states?

Interestingly (and somewhat surprisingly) nearly everyone interviewed felt that all resources should be centralized. Dividing up available funding among the states would provide too little to any one of the participating entities. Nearly all individuals interviewed felt that states could profit much more from the tailoring of overall regional strategies to their own localities. Operationally, this would mean that, at least during the first phase of institutionalization, the laboratory would use all funds received for conceptualization and for getting pilot projects to the field. During Phase II, one pot of money would be distributed to other organizations for implementation of pilot projects in sites x or y while a sustaining sum of money would be retained for continuing conceptualization by the laboratory itself.

Interesting also is the shared position that the Northeast laboratory--once established--might apply for non-N.I.E. funding in addition to its basic sources of revenues. This is not to imply that the organization turn into a "job shop." (Keeping the lab small will hopefully mitigate against that tendency.) Rather, it is to suggest that for regional solutions to national issues, the Northeast take advantage of funding that would help it find and implement solutions to its own problems while contributing to national R & D development.

Reinforcing this notion is the commonly expressed position that the Northeast lab tie in heavily to the national network of R & D laboratories. Constituents felt that much could be gained for the Northeast and the nation if the Northeast lab was part of a national system of interacting regional institutions.

VII. GOVERNANCE

The governance of the laboratory is the issue most often raised by constituents for it will determine how lab policy is made and how decisions for implementing these policies are determined. The governance structure and procedures are also the major vehicle for establishing what the laboratory's clients want and for insuring accountability on the part of the lab's staff and contractors.

In the Northeast the issue of governance is particularly heated because of the highly vocal and articulate presence of the region's many constituents, all clamoring for a new opportunity and structure to address their needs. In considering then the laboratory's governance structure, primary consideration must be given to establishing a method that will bring orderly representation to the broadest possible constituency. Attention need also be given to what the role and function of the governing body should be regarding policy development for programs and services, financing, staffing, and other operational features. And, related questions must also be addressed. For example, should advisory groups be mandated to assist in the governance? If so, what should be their role and function, and how should they be selected?

Several alternatives exist regarding the laboratory's governing structure:

• A large governing board could be established that would select or elect a smaller executive board to work directly with the laboratory staff to establish policy, direction, and operational procedures. The executive committee would report to the governing board on decisions it had reached. The governing board--through a 2/3 majority vote--could exercise veto power or approve decisions reached. The governing board would be composed of the seven chief state school officers, a representative of the teachers' organization in every state, representatives of higher education, parents, school superintendents, school principals, local and state boards of education, and private schools. In addition, the head of each state's Senate education committee should be included on the board. The executive committee would consist of one representative for each constituency group.

Whether the representative of the state teachers' organization is a practitioner chosen by the organization or an official of the association needs to be considered. (Representatives, rather than officials, might be preferable in order to reduce political polarization on issues.) Whether each type of constituency sends one person from each state (totaling 70 people on the board) also must be addressed. Also problematic is the question of who should represent higher education in each state:

officials from the public system and/or individuals from notable institutions in the private sector.

• A congressional model could be established. In this case, the House of Representatives would constitute the governing board just described and the Senate, the executive committee. Decisions would be based on a majority vote from each congressional body.

• An executive committee with one representative from each constituency group could be established. It would have decision-making responsibility over policy, direction and operational procedures of the laboratory. Each client group would be advised by an advisory committee comprised of representatives of that constituency group from every state. The advisory committee could be large in number, depending on how the constituency group decides on basis of state representation.

• An executive committee with 2-3 representatives from each state could be established. It would have decision-making responsibility over policy, direction and operational procedures of the lab. It would be advised by, and accountable to, a governing board in each state comprised of representatives from every constituency group within the state.

Whichever alternative is chosen, several critical conditions should be established. First, significant representation of women and minorities should be included in the profes-

sional categories governing the lab. Secondly, some degree of rotating representation should be established in order to introduce new approaches. Finally, a strong governing structure should be organized at each project site with its own representation. This will help to build up a political base on the local level and to reinforce the more generalized decision-making process. And, it will help to decentralize and localize constituency involvement so that R & D becomes more accepted and institutionalized throughout the educational community.

VIII. GEOGRAPHIC SCOPE

This paper has dealt with the question of whether there should be a laboratory in the Northeast and what such a laboratory should look like, if established. It has not yet considered the issue of geographic scope.

The way in which the Northeast states are to be served will depend heavily on how many and which states constitute the "region." Should New York be included in the region? Should the Northern tier states of New England be treated separately from the Southern tier?

The inclusion of New York State into the region evokes strong reaction--whether positive or negative. Some argue that the state has--

- Much in common with at least the rural problems of the New England states;
- Valuable solutions and approaches to issues confronting the entire region (e.g., competency standards, alternative education);
- Rich resources that can be drawn upon in dealing with specific problems and general concerns (e.g., School of Education at SUNY/Albany).

Others contend that

- New York City's size (1 million students) and needs are so extensive that it would sap the attention and

resources of the lab;

- The problems of New York City, in particular, are so different in extent and constituency approach to those of other Northeastern areas that its inclusion would create a bifurcation in the organization.

Some New England educators felt that the Northeast laboratory should only serve the six-state region; others believed that it should include New York State. Many however indicated that the lab would be most viable if it served a seven-state region minus New York City; a few thought that New York City should be made a satellite of the new regional laboratory.

Because only a certain amount of funds will be earmarked for a new R & D institution, N.I.E. will have to decide how far available monies can be made to stretch. In making a decision, attention should be given to the following observations made by the author during the interviews:

- Apparently, a strong and viable R & D coordinating capacity (MEDARP) already exists in New York City. If the City were omitted from the region, at least it would not be left "in a lurch." This capacity could easily be linked informally to a regional laboratory serving the seven states minus New York City.
- Fear by New Englanders of including New York into the region seems to center more around the city than

the state. Educators from New York City themselves admit that a single lab (unless located in New York City) cannot meet all the needs of the states and New York City.

- If a laboratory were to include New York City without being located there, then at least a satellite office in New York City appears warranted.

Drawing from the range of statements made about geographic scope, a possible solution that N.I.E. might consider is to initially exclude New York City from the laboratory and to rely on an informal relationship between the lab and MEDARP. As funds for the institution grow, a formal office of the laboratory might be established in New York City.

Separate and different treatment of the Northern and Southern tier New England states is a concern that need not be addressed by the lab. Although chief state school officers and teacher representatives of the Southern tier states felt that Vermont, New Hampshire and Maine may have different, and in some repsects, more severe problems that warrant independent attention, educators from the Northern tier states did not feel this way. In fact, they welcome the opportunity to identify with their Southern neighbors in a New England partnership rather than to be substantively and organizationally isolated from them, even if it means less direct and intensive services for the Northern tier.

IX. CONCLUSION

As previously indicated, the proposals presented in this paper are very much those of the author. Although based on a consensus of opinion reflected in the interviews held, they may not necessarily represent unanimity among the educational community of the Northeast.

In summarizing the views drawn from the discussions held, it seems that the establishment of an R & D laboratory in the Northeast would be a critical contribution to the region and to the nation. Such a laboratory would serve a need to coordinate existing resources, to bring order and rationale to uneven approaches to change agentry, improved practice, equity and effectiveness. More importantly, it would bring conceptual and organizational leadership to an area saturated with talent that is not yet well enough organized to systematically penetrate classrooms to upgrade teaching and learning.

In considering the establshhment of a laboratory, N.I.E. should not lose sight of existing organizations serving parts or all of the Northeast. Comtinued support should be given to available resources until they are substituted by the more comprehensive services and broad-based structure of the regional laboratory.